Phoenix Program
Process Definition – Purchasing Module

Process	***Maintain Items***
Process Number	***PO – 002*** *Revised 3/24/99*

Description of Process

This process describes the addition of new items to the item tables.

Input to Process

Item Data

Output of Process

Items ready for assignment to item catalogs and for use on requisitions, PO's and RFQ's.

Service Level Agreement Required? (if yes, provide a brief description)

PeopleSoft Panel Groups being Used

Function	Panel Group
Add items	Item Definition

Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1 - Go to Add Item Definition, enter SetID “State” and item number based upon the NIGP codes. Do not use dashes or hyphens.	State Purchasing Item Maintenance Group
Step 2 – Go to the “Establish an Item” tab and key the following: Description: The first 60 characters of the NIGP code description. This will usually include the 7-digit NIGP description followed by the 10-digit NIGP description. Approval Status: Check Initialization Complete Inventory Item: Uncheck Std UOM: Select the appropriate unit of measure for the item. Category ID: Select the 5 digit NIGP category associated with the item. Item Control Codes: If the item is an asset, check “Serial”. Leave all other fields blank.	“

Step 3 – Go to the Purchasing Attributes tab and key the following: PO Available Date: If a contract item, enter the contract effective date. If a Mandatory Source item, enter the date that the item will be available for purchase. Unavailable: If a contract item, enter the contract expiration date. If Mandatory Source, enter “12/31/2999”. Purchasing Description: This will default the first 30 characters of the “Description” field entered earlier. Modify if necessary to uniquely identify the item in a list box. Short Description: Will default the first 10 characters of the “Description” entered earlier. This does not need to be changed. Model: Enter the Manufacturer and Model or Part Number, if applicable. Account: Select the SCOA (State Chart of Accounts) field that is appropriate for the item. Standard Price: Enter the item’s Contract or Mandatory Source Price. Lead-time: Enter the contract delivery time or the Mandatory Source standard delivery time. Primary Buyer: Leave this field blank. Asset Profile ID: This defaults from the category. If the category is not flagged as an asset, this field will be blank and should probably be left blank. If an asset profile value is in the field, verify that the correct asset profile has defaulted and change if necessary. Long Description: Enter the full description of the NIGP item, usually inclusive of the 7-digit NIGP description. The remaining fields can be left blank.	“
Step 4 – Go to the Purchasing Attributes 2 tab and key the following: The Matching Controls and Receiving Controls default from the 5- digit NIGP category associated with the item. These should rarely need to be changed. Comment: Free form comments about the item. This might be used to list options and prices available with the item.	“

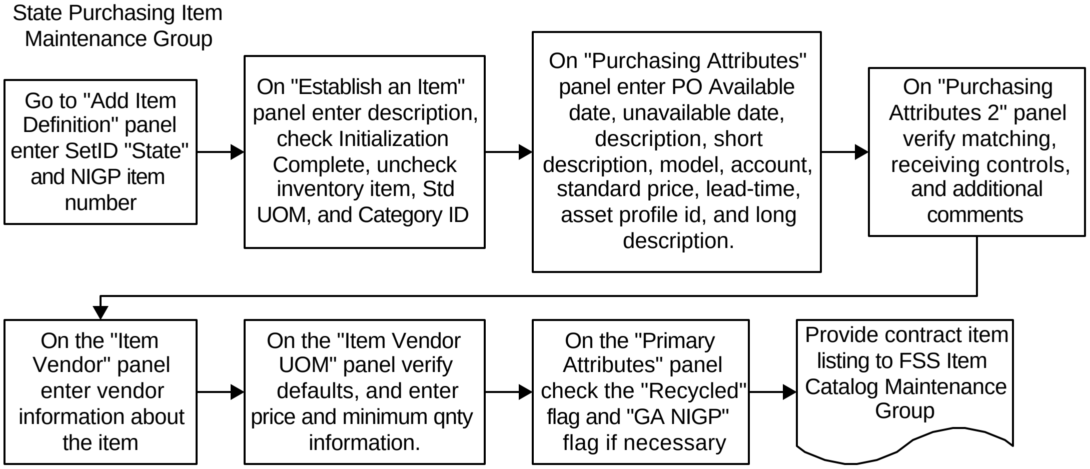
Step 5 – Go to the Item Vendor tab and key the following: Vendor: Select "State" and the Vendor ID for the vendor that supplies the item. Priority: This will default in numeric order as vendors are entered. Be sure the primary contact vendor is listed as priority 1 in cases where multiple authorized distributors can supply the item. Status: Select Active Price Date will default to "PO". Do not change. Price Qty will default to "line". Do not change. Price can be changed on order: Uncheck unless item represents a "dummy" item description and price. Use Item Standard Lead-Time: You may uncheck this and enter a lead time specific to the vendor being added. If you have only one vendor for an item or if all vendors have the same lead-time, this field can be checked and the system will use the lead-time entered on the "Purchasing Attributes" panel. Use Item Standard Tolerances: Check Accept any UOM: Uncheck Accept any Ship To: Check Insert new rows and re-key data for each vendor supplying the item if authorized distributors are being used.	"
Step 6 – Go to the Item Vendor UOM tab and key the following: UOM: This will default based upon the UOM entered on the "Establish the Item" panel. This should not need to be changed. Conversion Rate Type: This will default to "Standard" and should not be changed. Effective Date: This should be the same as the PO Available Date entered earlier. This will be the contract effective date or the date a Mandatory Source item becomes available. If a new price is going to become effective sometime during the contract term, a new row can be inserted indicating the "effective date" and the new price. Status: Select "Active". Price: Enter the contract price. This should usually be the same as the "Standard Price" entered on the Purchasing Attributes panel. Unless the contract has different vendors supplying the item at different prices, the "Standard Price" and this "Price" should be the same. Min Qty: Enter the vendors minimum order quantity if applicable. Otherwise, leave this field blank.	"

Step 7 – If the item is recyclable, go to the Primary Attributes tab and check “Recyclable”. If the item is a Georgia Assigned NIGP code, check the GA NIGP field. Other fields on this panel are optional.	“
Step 8 – Click the diskette on the Toolbar to save the item.	“
Step 9: Provide contract item listing to the FSS Item Catalog Maintenance Group.	“

Forms Used with Process (#)

**Attach sample form(s)

Process Flow Diagram:


State Purchasing Item Maintenance Group
Go to "Add Item Definition" panel enter SetID "State" and NIGP item number
On "Establish an Item" panel enter description, check Initialization Complete, uncheck inventory item, Std UOM, and Category ID
On "Purchasing Attributes" panel enter PO Available date, unavailable date, description, short description, model, account, standard price, lead-time, asset profile id, and long description.
On "Purchasing Attributes 2" panel verify matching, receiving controls, and additional comments
On the "Item Vendor" panel enter vendor information about the item
On the "Item Vendor UOM" panel verify defaults, and enter price and minimum qnty information.
On the "Primary Attributes" panel check the "Recycled" flag and "GA NIGP" flag if necessary
Provide contract item listing to FSS Item Catalog Maintenance Group

APPROVAL FORM

SIGNER	ROLE	DATE
Rick Housworth	DOAS Project Lead	3/1/99